

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Indicators:

Performance Measure	2002 Business Plan Results	2003 Business Plan Target	How are we doing?
PERCENT OF ACCURATE BOARD OF SUPERVISORS AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Assesses COB's quality & accuracy in preparing the agenda and identifies areas requiring training.	99.3% of published agenda titles were accurate with no errors.	99% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	88.3% of appeal applications were completed accurately and timely filed.	85% of applications accurately completed and timely filed.	Current litigation regarding 2% cap on annual property tax value increase has created public confusion for this filing period.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	99.5% of 2001 appeals have been resolved or waivers received. Cases in litigation included in unresolved. COB anticipates similar results for appeals filed in 2002.	100% of appeals resolved or waivers filed, excluding cases in litigation.	COB meeting goal due to manageable number of filings and quality tracking of database information and appeals.

At a Glance:

Total FY 2002-2003 Actual Expenditure + Encumbrance:	2,224,505
Total Final FY 2003-2004 Budget:	2,321,697
Percent of County General Fund:	0.09%
Total Employees:	32.00

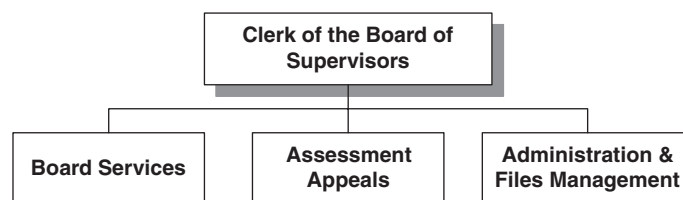
Key Outcome Indicators: (Continued)

Performance Measure	2002 Business Plan Results	2003 Business Plan Target	How are we doing?
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in bringing timely resolution to property value disputes.	100% of 2002 filings held initial hearings within one year, excluding those with applicant waivers filed.	100% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years and usage of automation, COB has been successful in providing this level of client service.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 96%-100% of respondents.	97% rating of services as good or outstanding.	COB has received favorable ratings from 95%-100% of its clients.

Fiscal Year FY 2002-2003 Key Project Accomplishments:

- Completed Phase III of Comprehensive Agenda Management Solution (CAMS). All County agencies/departments have now received training and can electronically create, share and submit their agenda items. Those staff reports and their back-up are then available via the internet for online viewing.
- Implemented e-file assessment appeals forms that can be completed and filed online.
- Completed design plan for Planning Commission Hearing Room ADA and security renovation. Construction of project has been deferred due to budget constraints.
- Received Board approval of agreement with vendor to market and sell County developed software products, "Conflict of Interest" and "Boards, Commissions and Committees". COB will receive all software upgrades at no additional cost and royalty payments on sales up to cost of development.

Organizational Summary



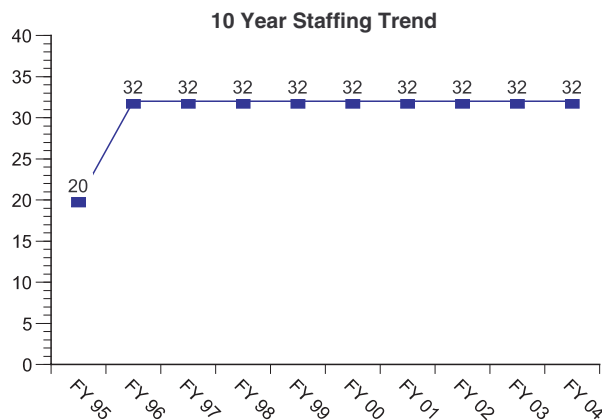
COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, postings and notices; receives and administers bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing, petty cash and payroll functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Through use of automation developed and implemented over the past few years, COB has been able to reduce ongoing operational costs and maintain level staffing. COB will continue to pursue cost savings and revenue enhancements where efficient and cost-effective. Ideas implemented include reducing printing costs by distributing materials electronically, sale of County-developed software and scheduling changes to reduce the number of assessment appeal board hearings required.

Changes Included in the Base Budget:

Revenue for 03-04 has been reduced by \$40,000 due to deferral by the State of SB90 payments for mandated costs.

Increase to salaries and employee benefits budget is due to negotiated wage increases and increased costs of retirement and health insurance.

In order to meet the 03-04 NCC limit, COB was required to reduce its services and supplies budget by over \$150,000. Areas targeted for reduction are telephone charges, printing, temporary help, general office supplies, building maintenance and improvements and deferral of year 2 planned replacement of computer monitors. COB will also be exploring scheduling changes to reduce the number of assessment appeal board hearings and stipends paid.

Final Budget and History:

Sources and Uses	FY 2001-2002 Actual Exp/Rev	FY 2002-2003 Budget As of 6/30/03	FY 2002-2003 Actual Exp/Rev ⁽¹⁾ At 6/30/03	FY 2003-2004 Final Budget	Change from FY 2002-2003 Actual	
					Amount	Percent
Total Positions	-	32	32	32	0	0.00
Total Revenues	64,974	45,613	7,635	8,800	1,165	15.26
Total Requirements	2,423,867	2,352,634	2,282,643	2,321,697	39,054	1.71
Net County Cost	2,358,893	2,307,021	2,275,008	2,312,897	37,889	1.67

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2002-03 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page 443.

Highlights of Key Trends:

- COB will continue to pursue new automation and enhancements to existing systems when it is cost effective and provides greater access to information and services.
- COB will continue to review its work flow to increase efficiencies and eliminate any duplicative or unnecessary work products.
- Assessment Appeal filings have remained at a manageable level for several years, but the trend could be impacted by economic, legislative and legal factors.
- COB workload and required resources could be negatively impacted by current litigation, in the short-term to research and provide requested information and in the long-term by potential outcomes of the cases.

Budget Units Under Agency Control

No.	Agency Name	Cob - Executive	Board Services	Assessment Appeals	Administration/Files Mgt	Total
011	Clerk Of The Board	326,066	515,828	845,066	634,737	2,321,697
	Total	326,066	515,828	845,066	634,737	2,321,697